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U.S. Department of Agriculture · Foreign Agricultural Service · Washington, D.C.

# foreign agriculture circular

coffee

FCOF 1-75 January 1975

### WORLD COFFEE PRODUCTION ESTIMATE DOWN [Statistics] #

#### **Summary**

Total 1974–75 coffee production, at 79 million bags, will be about 1 million bags less than the October estimate. Exportable production currently is forecast at approximately 58.8 million bags (132.276 lb each), down about 1.3 million bags from the previous estimate. As considered here, exportable production represents total harvested production, minus domestic consumption in the producing countries. It does not take into account stocks from previous harvests still available in some producing countries.

These new estimates result from minor adjustments in a number of countries, based on recent information. Some small revisions have also been made in estimates for 1973–74 production, which is now placed at 62.2 million bags, of which about 42.6 million were available for export.

#### **Production**

#### North and Central America

Although Hurricane Fifi brought excessive rains, flooding, and high winds that caused damage to some crops in September, coffee was little affected. Total coffee production in these countries will be about 13.2 million bags, a slight downward revision from the last estimate, but an increase of about 4 percent over the 12.7 million bags produced in 1973–74. Plans for acreage expansion and yield improvement in several of these countries have been slowed somewhat as a result of simultaneous increases in the cost of agricultural chemicals, fertilizer, and labor.

Costa Rica's total production estimate has been revised to about 1.4 million bags, with exportable production of 1.2 million bags.

Total production in **El Salvador** is anticipated to be about 2.6 million bags, as favorable weather conditions brought early rains that facilitated maturation of the coffee crop. The increased production is also partially the result of improved cultural practices. There has been a growing tendency in recent years to plant more shadeless

varieties to take advantage of the limited available area. Area in coffee production is believed to have remained fairly stable at about 363,000 acres.

Total coffee production in **Honduras** for 1974–75 is expected to be about 790,000 bags, slightly above the good crop of 1973–74. The Honduran National Coffee Census reports that coffee has been planted on an additional 22,000 acres, but the trees are not yet producing. It is expected that average output should increase about 10 percent when these new plantings come into production over the next few years.

The 1974–75 coffee crop in **Guatemala** is expected to equal the 1973–74 crop of 2.2 million bags. Although a slightly larger crop was anticipated, it is now believed that the crop was reduced by about 100,000 bags as a result of recent volcanic eruptions that showered coarse sand over plantations near the slopes of Fuego volcano.

Jamaica's total production in 1974–75 is expected to be 20,000 bags, a 30 percent decrease from the record 1973–74 crop. The sharp decline is attributed to a serious drought from January to mid-August 1974, which affected most of the coffee growing areas on the island. Future coffee crops could also be affected, as the drought killed over 50 percent of the seedlings in many areas that had been planted in the late fall of 1973.

Mexico's total coffee production in 1974–75 is approximately 3.5 million bags, a 6 percent increase over the 1973–74 level of 3.3 million bags. The increase is largely the result of a favorable crop year and the efforts of the Mexican Coffee Institute (IMECAFE), which has made extensive inputs into the coffee sector through the establishment of cooperatives to serve growers with credit, supplies, technical assistance, and a system for marketing.

Trinidad and Tobago's 1974–75 coffee crop is now estimated at 38,000 bags, an increase over the 1973–74 crop, which was affected by a drought and a shortage of labor at harvesttime, and was finally cut short by tropical storm Alma. Efforts to repair storm damage and the ongoing coffee rehabilitation program undertaken by the Government face problems in increasing production. Coffee is

grown as a hedgerow crop and is generally of minor importance on most estates. This limits the attention given to programs on individual farms.

Early season rains in **Nicaragua** brought maturation to the 1974–75 coffee crop, which is now estimated at 650,000 bags. This represents an 11 percent increase over the 1973–74 crop of 585,000 bags. Yields have been increasing, as the National Bank continues its program of financing new and replacement plantings.

#### **South America**

Production in South America for the 1974–75 harvest is now estimated at 39.6 million bags, a slight downward revision from the last report. Exportable production is now estimated at 27.4 million bags.

Total production of 27 million bags for **Brazil** remains unchanged, with exportable production revised downward by 250,000 bags to 17.5 million bags. The program for the subsidized planting of 600 million new coffee trees is nearly completed and will bring the total number of coffee trees in Brazil to about 3 billion. According to Brazilian sources, the planting program will result in average crops of 28–30 million bags a year within 2–3 years. The rising costs of fertilizer, labor, and other chemical inputs continue to be a major problem for the Brazilian coffee industry.

Colombia is expected to have a record outturn of 9.5 million bags with estimated exportable production reduced 50,000 bags, to 7.9 million. The increase in production over the 1973–74 level is partially the result of the renovation of coffee plantations and entry of the new high-yielding Caturra variety into the bearing stage. Colombia's new freeze-dried soluble coffee plant located in Chinchina is expected to increase production to 1,800 metric tons in 1975, from 1,200 tons in 1974.

Favorable weather conditions throughout the growing and harvesting seasons in 1974 were expected to give **Ecuador** a large harvest for 1974–75. On the basis of recent, more complete data, total production is estimated at the comparatively normal level of over 1 million bags for 1974–75. This represents a downward revision of 175,000 bags from the last report, but an 18 percent increase over the reduced crop of 1973–74.

Total production in **Venezuela** is now estimated at 1 million bags, a downward revision of 200,000 bags from the earlier 1974–75 estimate.

#### Africa

Total production in **Kenya** is expected to equal the 1973–74 crop of 1.1 million bags. The high incidence of Coffee Berry Disease (CBD) brought on by 4 months of heavy rain and 2 months of cold weather in 1974 lowered the earlier 1974–75 production estimate by 250,000 bags. The Government of Kenya's main concern is breeding for resistance to CBD. No new coffee plantings are planned.

but efforts are being made to increase yields from existing trees.

The 4.1 million bag total production estimate for the **Ivory Coast** remains unchanged, with exportable production estimated at about 4 million bags. The new coffee processing plant at Toumbokro—the first of seven such plants planned for principal producing areas—is ready to begin full production this year. A new matter of concern has been a recent outbreak of Laphygama caterpillars, which is reported to have nearly destroyed the coffee crop in certain areas. The areas infested account for 5–7 percent of total production in the Ivory Coast.

Total production in **Angola** for 1974–75 remains unchanged, estimated at about 3.6 million bags. The 1974–75 crop estimate for **Ethiopia** also remains unchanged at about 2 million bags, which is a 21 percent increase over the drought affected 1973–74 crop.

The 1974–75 production estimate for **Zaire** has been reduced 12 percent and is now set at 1.1 million bags. This rapid decline in production is partially the result of a transfer of nearly all foreign-owned coffee plantations to State control.

Total production in **Liberia** for 1974–75 will be about 75,000 bags, an increase of about 15 percent over the 1973–74 level. The Liberian Produce Marketing Corporation (LPMC) has established nurseries for the replenishment of coffee trees. During the 1974–75 season, LPMC plans to sprout 1.3 million seedlings.

The 1974–75 crop for Nigeria will be up slightly from that of the previous year, but coffee continues to be a minor cash crop. The increased producer price has done little to stimulate improved cultural practices and is not expected to encourage increased production. The coffee marketing system in Nigeria has been changed. The previous autonomous State marketing boards are now under the control of the Nigerian Produce Marketing Board (NPMC). All decisions concerning coffee, such as its purchase, manufacture, and export, will be made by NPMC.

Total production in **Cameroon** for 1974–75 is expected to be 1.25 million bags, about 4 percent below last year's drought stricken crop. A shortage of fertilizer has been a major problem confronting the Cameroon coffee industry.

#### Asia

Total production in **India** for 1974–75 has been revised downward by 4 percent and is now estimated at 1.7 million bags. The drop in the production estimate is mostly the result of heavy rains incurred in July, which caused landslides, uprooting of trees, and dropping of berries in some areas

The 1974–75 production estimate for **Papua-New Guinea** is about 650,000 bags. The New Guinea Government has reversed its previous policy to hold coffee production at a stable level, and has lifted all restrictions on plantings in the native section. There are plans to bring an additional 20,000 acres into production.

### Other Developments

Green coffee imports by the United States during the first 10 months of 1974 were approximately 16.5 million bags, about 11 percent less than the amount imported in the same period a year earlier, and less than the 1970–73 January-October average of 18.3 million bags. The reduced volume of imports is partially the result of a drawdown in stocks in the United States, which has lessened import demand somewhat. At the end of October 1974, U.S. inventories of green coffee were estimated at 3.2 million bags, a 35 percent reduction from the January-June 1974 average of 4.9 million bags. U.S. soluble coffee imports for the January-October period in 1974 continued to exhibit an increase over previous years' levels. Soluble imports for the 10-month period in 1974 were 1.5 million bags, 22 percent above those for the comparable period in 1973.

Green coffee prices in the fourth quarter of 1974 were above those for previous third quarter levels. Colombians have shown the strongest recovery, selling for 82 cents spot on December 17, a price equal to the previous 1974 high reached last June. Ambriz AA (Robusta) increased to about 56 cents in mid-December, a 6 percent advance over the September 30 level. Santos 4's showed a gain of 4 percent and 5 percent centrals, over end of third quarter prices.

Brazil's green coffee exports of 7.6 million bags during January-September 1974 indicate a reduction in volume

and this trend may continue through the end of 1974. Brazil's total green coffee exports for calendar 1974 are likely to be below the 17.5 million bags exported in 1973–74. The reduction in exports is partially caused by the unsynchronized use of various marketing tools, such as minimum export prices, discounts, and internal support prices, which have not kept pace with international market conditions.

Several Central American coffee producers, including Costa Rica, Honduras, Guatemala, Panama, El Salvador, and Mexico, met in Caracas in November and agreed to form a new company, "Cafe Suaves Centrales S.A.," to implement and coordinate national retention schemes in an effort to maintain world coffee prices. One of the first objectives of the company will be to seek a basic price of 71 cents per pound. It has also been reported that Venezuela will provide up to \$80 million on a loan basis to finance coffee stockpiling by the Central American States. Venezuela may also provide access to a special \$500 million fund it is to set up with the Inter-American Development Bank. The company was formally established in January 1975, with headquarters in Mexico City.

The world's major coffee producers meeting in London in December agreed that a new International Coffee Agreement (ICA) must contain a provision guaranteeing periodic adjustments of prices, so that earnings from coffee exports are maintained in real terms. At the same time, producers were discussing their own plans for the retention of coffee from the world market.

COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70, ANNUAL 1970-71/1974-75 1/

(IN THOUSANDS OF BAGS) 2/							
REGION AND COUNTRY :	AVERAGE 1965-66/1969-70	: : 1970-71	: : 1971-72		: 1973-74	: : 1974-75	
NORTH AMERICA:							
COSTA RICA	1.250	1,250	1,350	1,335	1 500	. 304	
CUBA	472	475	460	475	1.590	1,390	
OOMINICAN REPUBLIC	587	700	715	750	500	450	
EL SALVAOOR	2.116	2,170	2,600	2.100	750 2,070	750 3.570	
GUAOELOUPE	4	1	1	20100	24010	2,570	
GUATEMALA	1,812	1,840	2,100	2,250	2,200	2,200	
MAITIOGRAPOSOSOSOSOSOS	497	550	575	525	550	550	
HONOURAS	456	570	700	850	775	790	
JAMAICA	20	20	24	22	30	20	
MARTINIQUE	3	1	1	1	i	i	
MEXICO	2,895	3,200	3,400	3,700	3,300	3,500	
PANAMA	520	650	700	570	585	650	
TRINIOAO-TOBAGO	80 55	75	88	82	72	80	
US-HAWAII	39	69 31	49	50	30	38	
US-PUERTO RICO	244	240	21 150	22	16	20	
-			150	200	220	500	
TOTAL	11,050	11,842	12,934	12,933	12,690	13,210	
DUTH AMERICA:							
BOLIVIA	122	75	85	95	95	90	
DKA416000000000000000000000000000000000000	23,240	9,750	23,600	24,000	14,500	27,000	
COLOM8IA	8,030	7,800	7,200	8,800	7,800	9,500	
ECUAOOR 3/	969	1,300	1,100	1,100	870	1,025	
GUYANA	19	11	10	12	10	10	
PARAGUAY	54	33	58	50	40	45	
PERU	888	990	1.030	1,030	1.000	900	
SURINAM	7	3	3	3	3	3	
	807	900	950	1,100	960	1,000	
*OTAL	34+136	20,862	34,036	36,190	25,278	39,573	
RICA:							
ANGOLA	3,180	3,300	3,400	3.750	3,500	3,600	
8URUNOI	254	350	400	355	350	375	
CAMEROON	1,120	1,150	1,250	1,440	1,300	1,250	
CARE VEROE ISLANOS CENT AFRICAN REP		. 1	1	1	1	1	
COMORO ISLANOS	173	160	175	180	190	j80	
CONGO, BRAZZAVILLE	.3	3	2	2	2	2	
OAHOMEY	15	15	14	14	12	14	
EQUATORIAL GUINEA	19 129	15	15	15	13	14	
ETHIOPIA	1.814	2,100	115	115	105	120	
GABON	17	15	2,150	2.100	1.700	2,050	
GHANA	82	75	10 80	15 80	9	10 45	
GUINEA	166	150	100	125	45 105	115	
IVORY COAST	3,850	4,000	4,475	5,050	3,285	4,100	
KENYA	832	1,000	1,000	1,265	1,100	1,100	
LIBERIA	65	85	70	85	65	75	
MALAGASY REPUBLIC	904	1,300	965	1,000	1.000	1,100	
NIGERIA	44	90	70	70	38	40	
RWANDA	168	250	260	186	266	256	
SAG TUME-PRINCIPE	_6	3	2	2	2	2	
SIERRA LEONE	90	125	95	135	67	133	
TANZANIA	823	950	850	800	600	950	
T000	198	200	200	200	180	20 <sub>0</sub>	
ZAIRE (CONGO+K+	2,887	3,000	2,850	3, 300	3.100	3.100	
	995	1,350	1,300	1,380	1+150	1,085	
TOTAL	17,835	19,807	19,849	21,665	18,185	19,917	
IAt							
INOIA	1,209	1,900	1,200	1.580	1.535	1,675	
INDONESIA	2,080	2+350	2,250	2,700	2,750	2,800	
MALAYSIA	120	60	63	65	67	70	
PHILIPPINES	741	840	835	850	865	900	
	47 54	50	65	65	60	65	
VIETNAM, SOUTH	•	50	50	55	55	00	
YEMEN	65	50	45	45	25	35	
TOTAL	4,316	5,300	4,508	5.360	5,357	5,605	
EANIA:							
NEW CALEOGNIA	34	18	25	25	25	25	
NEW GUINEA	265	460	480	560	624	650	
NEW HEBRIDES	4	2	2	2	2	2	
TOTAL	303	480	507	587	651	677	
_							
WORLD TOTAL	67,640	58,291	71,834	76 • 735	62.161	78,982	
	0,,000	20121	111034	101132	05.101	101:05	

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U. S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

Note: Production estimates for some countries include cross-border movements.

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70, ANNUAL 1970-71/1974-75 1/

		(IN THOUSANDS	OF 8AG5) <u>2</u> /			
REGION AND COUNTRY :	AVERAGE 1965-66/1969-70	: : 1970=71 :	1971=72			
ORTH AMERICA:	1,110	1.095	1,190	1.160	1,420	1,215
CUBA	56	50	35	20	50	*****
OOMINICAN REPUBLIC	415	505	490	490	505	495
EL SALVACOR	1,976	2.015	2,440	1,935	1.895	2,390
GUAOELOUPE	3/	3/	3/	3/	3/	3/
GUATEMALA	1,585	1,590	1,845	1,990	1,925	1.915
HAITI	314	350	370	325	340	335
HONDURAS	362	460	575	720	635	650
JAMAICA	7	5	9	6	14	4
MARTINIQUE						
MEX1CO	1,525	1,680	1,835	2,100	1,690	1,835
NICARAGUA	462	570	615	480	496	558
PANAMA	18	9	23	20		5
TRINIOAO-TOBAGQ	42	53	27	40	13	21
US-HAWAll	11	10	1	2		
U5-PUERTO KICO	6					
TOTAL	7,890	8,392	9,455	9.288	8,983	9,423
_						
OUTH AMERICA!	45	45	45	45	72	40
BOLIVIA	45 15.039	1.500	14.850	15.000	73	17.750
BRAZIL	15,039	1,500	14,850	15,000	5,500	17,750 7,900
COLOMBIA	6,740 769	6,390	5,750 875	7,430	6,250	7.700
ECUAOOR 4/	109	1.080	8/3	860	625	1,2
PARAGUAY	38	13	43	35	18	22
PERU	680	760	800	800	750	640
SURINAM	2	1	1	1	1	<u> </u>
VENEZUELA	235	265	300	430	255	27 <b>0</b>
TOTAL	23,550	10,074	22,684	24,621	13,472	27,426
===						2172
RICA: ANGOLA	3,112	3,200	3,300	3,650	3,395	3,495
BURUNOI	249	345	395	350	345	345
CAMEROON.	1,090	1,125	1,220	1,410	1,273	1,223
CAPE VEROE ISLANDS	2	.,,	.,		2,72,73	.,
CENT AFRICAN REP	168	150	165	170	179	169
COMORO ISLANDS	1	1	1	1		
CONGO. BRAZZAVILLE	14	14	13	13	11	13
OAHOMEY	15	14	14	14	12	13
EQUATORIAL GUINEA	119	115	110	110	100	115
ETH10PIA	1,346	1,450	1,490	1,410	1,005	1,340
GABON	17	14	9	14	8	9
GHANA	66	62	67	67	31	31
GUINEA	154	145	95	120	100	109
IVORY COAST	3,795	3,950	4,400	4,985	3,219	4,032
KENYA	812	988	973	1,240	1.073	1,072
L18ERIA	62	80	65	80	60	69
MALAGASY REPUBLIC	794	1+175	835	865	865	960
NIGERIA	42	65	50	40	11	12
RWANDA	163	245	254	180	260	250
SAO TOME-PRINCIPE	4	1	1	1		
SIERRA LEONE	81	120	90	130	62	128
TANZANIA	808	930	830	780	578	928
T0G0	193	197	197	197	177	197
UGANOA	2,872	2,985	2.830	3,280	3+078	3,078
ZAIRE (CONGO+K+	940	1 • 150	1.200	1,265	1.040	975
TOTAL	16,920	18,521	18,604	20,372	16,882	18,563
1A:						
1N01A	497	1,150	435	820	730	855
INDONE51A	1,598	1,450	1,320	1,650	1,795	1,825
MALAYSIA					.,,,,,	1,4200
PHILIPPINES		22				
PORTUGUESE TIMOR	42	40	60	60	50.	54
VIETNAM,50UTH	3/	3/	3/	3/	3/	3/
YEMEN	55	40	<b>ว</b> ีร์	35	20	30
TOTAL	2,192	2,702	1,850	2,565	2,595	2,764
EANIA:						,
NEW CALEOUNIA	26	8	15	15	1.6	14
NEW GUINEA	250	456	15 474	15 554	14	14
NEW HEBRIDES	3	1	1	1	620	646 1
					1	•
TOTAL	279	465	490	570	635	661
WORLO TOTAL	50.831	40 • 154	53.083	57,416	42,567	58,837
			30,000	31)720	721301	30,031

<sup>1/</sup> Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. 2/ Of 60 kilograms each. 3/ Negligibe. 4/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1971 in that country is shown as production for the 1971-72 marketing year. In Ecuador, however, this is referred to as the 1970-71 crop.

Note: Production estimates for some countries include cross-border movements.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

COFFEE: EXPORT VALUE AS PERCENT OF TOTAL EXPORTS, 1969-73 (In percent)

Continue of a sector	: 3000	: 2070	• • • • • • • • • • • • • • • • • • • •	:	:
Continent and country	: 1969	: 1970 :	1971	<b>1</b> 972	1973
	:				
North America:	:		,		
Costa Rica		31.6	26.3	27.7	26.8
Dominican Republic		12.1	, 9.4	7.2	9.4
El Salvador		48.7	40.0	38.1	43.7
Guatemala		34.7	35•3	32.2	33.4
Haiti		31.5	52.3	27.8	35.5
Honduras		15.2	13.2	18.2	17.7
Mexico		6.0	4.6	4.7	7.6
Nicaragua	: 13.0	18.0	15.6	13.2	19.3
South America:	:				
Brazil	35.2	34.3	26.6	24.8	21.7
Colombia		66.0	55.1	49.2	39.3
Ecuador	•	23.1	15.3	16.4	10.9
Peru		4.3	4.3	1.5	6.2
Venezuela	0.5	0.6	0.5	0.5	0.5
Africa:	:				
	34.5	21 0	22.1	27.6	20.0
Angola		31.9 N.A.	33.1 25.4		39.0 25.6
Cameroon	A	61.5	27.4 56.5	27.0 48.4	42.2
Ethiopia		33.2			-
		33.2 31.1	33•3 26•7	25.8	25.2
Kenya	:		26.7 26.5	27.3	29.2
Malagasy Republic		27.2 18.5		27.8	37.4
Tanzania		58.3	13.1 58.7	18.9 60.9	22 <b>.</b> 1 67 <b>.</b> 6
Uganda	55.8	20.3	20.1	00.9	01.0
Asia and Oceania:	:				
India	-	1.6	1.6	1.4	2.1
Indonesia	: 7.0	6.2	4.5	4.3	4.1

Prepared or estimated on the basis of offical statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information. Subject to revision.

GREEN COFFEE: Exports from specified countries, by country of destination, calendar year 1973 (In bags)  $\underline{1}/$ 

Country of destination	Angola :	Brazil	Colombia	Guatemala	: :Ivory Coast	: Mexico
Europe: Austria Belgium-Luxembourg Bulgaria Czechoslavakia	39 <b>,</b> 583	115,779 305,886 1,499 1 <b>9</b> 7,987	60,254	6,867 63,417  2,500		62,827
Denmark Finland France Germany, East Germany, West	11,067 7,317 110,183  91,050	733,251 316,466 872,019 467,107 846,479	81,440 357,931 164,624 45,866 1,291,718	16,017 88,450 11,100  393,133	2,533 949,633 139,550	2,501 7,834 65,547 11,500 156,638
Greece Hungary Iceland Italy Netherlands	68,517 199,250	623 56,328 32,800 2,317,417 894,237 399,439	700  57,116 408,638 58,345	11,467 109,117 23,650	18,650 186,900  22,950 55,016	25,400 39,784 4,810
Norway Poland Portugal Spain Sweden Switzerland	13,333 341,850 266,217	235,553  442,986 1,171,060 133,037	39,921  301,268 339,405 27,546	14,083  6,667 30,517 10,817	6,717	76,936 2, <b>49</b> 6 575
United Kingdom USSR Yugoslavia Total		765,930 310,152 318,786	36,521 54,999 33,270 3,396,362	10,783  798,585	39,100 417  1,421,466	13,697  16,669 487,214
North America: Canada United States Others		175,666 4,839,350		1,077,333	1,123,083	8,403 1,758,489 
Total	2,042,000	5,015,016	3,083,056	1,085,850	1,123,083	1,766,892
South America		416,590	97,012	867		8,020
Africa	<b>1</b> 57 <b>,3</b> 33	424,605	4,691		439,300	60 GP 610
Asia and Oceania	134,667	887,808	151,012	27,381	339,183	57,903
Not specified	833	985	18,942		4,485	
Grand total	3 <b>,</b> 644 <b>,</b> 332	17,679,825	6,751,075	1,912,683	3,327,517	2/2,320,029

 $<sup>\</sup>underline{1}/$  Bags of 60 kilograms or 132.276 pounds.  $\underline{2}/$  Includes 7,202 bags soluble coffee and 164,304 bags roasted coffee, in green coffee equivalent.

Foreign Agricultural Service. Compiled from official statistics of specified countries.

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